Overview

As of Monday, April 30, 2018 Agents are able to access and export their own individual Agent Book of Business from their Agent portal. The Book of Business reflects consumer data from the week prior on Friday at 9 p.m. Any changes made after 9 p.m. on Friday will not be reflected until the following Friday between 9 p.m. and midnight.

The Book of Business is provided as an Excel document, which allows you the flexibility to sort, manipulate and maintain consumer data. The Book of Business contains Covered California, Mixed Household, and Medi-Cal consumers.

Please Note: Using the filters on the Active Consumer list will not populate the results of the exported Book of Business.

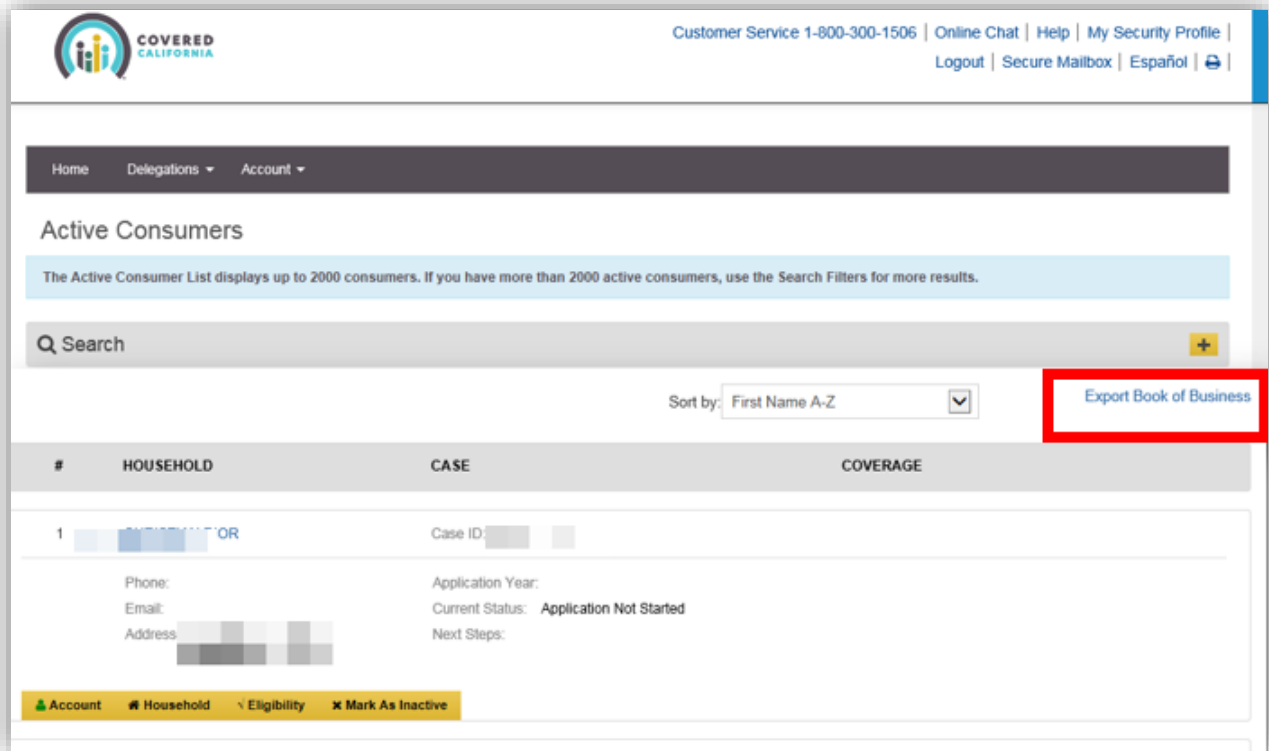**Personally Identifiable Information (PII)**

PII is found within the Book of Business export and must remain secure and confidential in accordance with Covered California's Security and Privacy policies as outlined in the Agent Agreement, including all applicable laws and regulations. It is the Agent's responsibility to ensure that they handle this information in the appropriate manner. Remember that emails with consumer PII must be encrypted or secured.

The Book of Business is provided as an Excel document, which allows you the flexibility to sort, manipulate and maintain client data. The Book of Business contains Covered California, Mixed Household and Medi-Cal members.

This Job Aid is designed to walk you through the steps to obtain your Agent Book of Business file.

-See Step-by-Step Instructions Below-

Agent Export Process:

1. Log into your CalHEERS Agent Portal and land on the Agent Dashboard.

2. To download your individual Book of Business, select "Delegations" from the header and then click "Active Consumers."

3. From the "Active Consumers" page, select the "Export Book of Business."

4. The Book of Business will export in an excel file with the consumer data. You are now able to view and sort enrollment data, consumer data, Med-Cal information, etc. for your consumers.

Understanding the Book of Business Report

The Book of Business Description Chart provides a description of the fields found within the Book of Business.

Please note: If the information is not applicable or not provided, the data under each column will be blank.